

Item 9.1.

Section II – Items for Executive Action

TO: Chair and Members of the Executive Committee
Meeting #2/19, Friday, March 01, 2019

FROM: Michael Tolensky, Chief Financial and Operating Officer

RE: **REQUEST FOR PROPOSAL FOR CONSULTING SERVICES TO MIGRATE
IBM NOTES TO OUTLOOK ONLINE**
RFP No. 10009831

KEY ISSUE

Award of Request for Proposal (RFP) No. 10009831 for consulting services to migrate TRCA from existing IBM Notes email, calendar and resource reservations to Office 365 Outlook online.

RECOMMENDATION

WHEREAS Toronto and Region Conservation Authority (TRCA) is engaged in a project that requires technical consulting services;

AND WHEREAS TRCA solicited proposals through a publicly advertised process and evaluated the proposals based on pre-established criteria;

THEREFORE, LET IT BE RESOLVED THAT Request for Proposal (RFP) No. 10009831 for Migration from IBM Notes to Outlook Online be awarded to TELUS Communications Inc. at a total cost not to exceed \$125,975 plus applicable taxes, to be expended as authorized by TRCA staff;

THAT should TRCA staff be unable to negotiate a contract with the above-mentioned proponent, staff be authorized to enter into and conclude contract negotiations with other Proponents that submitted proposals, beginning with the next highest ranked Proponent meeting TRCA specifications;

AND FURTHER THAT authorized TRCA officials be directed to take whatever action may be required to implement the contract, including the obtaining of necessary approvals and the signing and execution of any documents.

BACKGROUND

TRCA is undergoing a major transformation in how it utilizes information technology (IT) across the organization. One of the priority initiatives is to replace the Lotus Notes email system, migrating all email and calendar services to Microsoft Outlook using the cloud-based Office 365 solution. This decision is aligned with the new Digital Transformation Strategy direction to move all TRCA technology operations to a cloud computing environment. Migrating to a cloud-based IT environment will eliminate the need for a formal data centre in TRCA's new headquarters as well as allow for better staff access to applications from any location over the Internet with improved reliability and business continuity.

At the Friday July 20, 2018 Authority Meeting #6/18 the report titled "Information Technology Consulting Services, Award of Preferred Source Contract" was approved regarding consulting services to support the migration from Lotus Notes to Outlook online. Information Technology had planned to use this consultant to complete the migration to Outlook in the fall of 2018.

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The migration did not take place as planned due to other operational priorities introduced by the newly hired Chief Information Officer and other business priorities including the introduction and launch of a Human Resources Information System in January 2019. The consultants hired in 2018 had completed minimal work towards the migration and the engagement and associated procurement of services was terminated as per section 1.9 of the agreement of professional information technology consulting services. In January 2019, a request for proposal was issued to solicit proposals to perform the migration of email and calendar from Lotus Notes to Outlook online. Three complete proposals were received and evaluated with TELUS Communications Inc. being recommended as the successful proponent.

RATIONALE

RFP documentation was emailed to vendors from the Province of Ontario's Vendor of Record list for Technology Consulting Services on Thursday, January 3, 2019 and closed on Thursday, January 24, 2019. 2 addendums were issued to respond to questions received. A total of 5 firms received the documents and 3 proposals were received from the following Proponent(s):

- TELUS Communications Inc.
- DXC Technology
- Long View Systems Corporation

An Evaluation Committee comprised of staff from Information Technology Management reviewed the proposals. The criteria used to evaluate and select the recommended Proponent included the following:

| Criteria | Weight |
|---|--------|
| Proponent's Information and Profile <ul style="list-style-type: none">• Proponent has provided all requested information in a clear manner. | 5 |
| Key Personnel <ul style="list-style-type: none">• Demonstrated experience in similar migrations projects.• Expert knowledge of IBM Notes environments, configurations and application functionality.• Demonstrated experience with Microsoft's Office 365 environment, specifically; Outlook Online, its functionality, configurations and how it relates to migrations such that being proposed. | 10 |
| Experience and Methodology <ul style="list-style-type: none">• Proponent will have demonstrated experience in similar migration projects under similar timelines as required by the Scope of Work• Proposed methodologies have been used in previous projects of similar scale and scope. The methodologies are well tested with clear processes and procedures detailed in the proposal. | 25 |
| Scope of Work Capabilities <ul style="list-style-type: none">• The proponent can demonstrate their ability to meet or exceed the project items as detailed in the Scope of Work. | 15 |

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| Proposed Work Plan and Timeframe | |
| <ul style="list-style-type: none">The proposed Work Plan is clearly outlined in a manner which details all work activities, who is responsible for each activity, along with the timing associated with each activity.The Work Plan details the time required from initiation of the Project until completion, including any contingencies required for unforeseen issues such as technical problems or resource allocations. | 15 |
| Sub-Total (minimum score of 50 required) | 70 |
| Pricing (minimum score of 20 required) | 30 |
| Total Points (minimum score of 70 required) | 100 |

TELUS Communications Inc. demonstrated the most experience managing similar migrations. They provided the most efficient timeline and workplan for this project. Therefore, it is recommended that contract No. 10009831 be awarded to TELUS Communications Inc. at a total cost not to exceed \$125,975, plus applicable taxes, it being the highest ranked Proponent meeting TRCA specifications. Proponent's scores and staff analysis of the evaluation results can be provided in an in-camera presentation, upon request.

Timeline

Once a contract is executed between TRCA and TELUS Communications Inc. the project will commence. Based on the proposal timeline the project is estimated to be completed within 8 to 10 weeks from commencement. It is anticipated that the migration will be completed in late May 2019.

Relationship to Building the Living City, the TRCA 2013-2022 Strategic Plan

This report supports the following strategic priority set forth in the TRCA 2013-2022 Strategic Plan:

Strategy 7 – Build partnerships and new business models

Strategy 10 – Accelerate innovation

Strategy 11 – Invest in our staff

FINANCIAL DETAILS

Funds are identified in TRCA's 2019 capital budget from TRCA's municipal partners in the IT capital budget account 014-01.

Report prepared by: James Dong, extension 5357

Emails: jdong@trca.on.ca

For Information contact: Chris J. Moore, extension 5720

Emails: chrisj.moore@trca.on.ca

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